



State of Montana Project Management Office

Project Delivery and Closure Phase

Project Deliverables Release Form Instructions

This template provides a form for officially releasing one or more project deliverables for deployment to users of the deliverable.

The file includes example release forms for:

- Releasing software modules to customers of hardware/software products/systems.
- Releasing a publication (such as a user manual) to users.

It can be adapted for releasing any project deliverable to wider distribution and use.

No matter what your project type and size, chances are you can make good use of formal releases of deliverables. Release mechanisms are used to formally communicate that a deliverable has reached a specific state of completion and, thus, can be deployed to certain groups of “customers” or users of the deliverable.

These releases can happen during a project, such as for releasing a project component to another group for their use; late in the project when you want to make limited early deliveries to key customers; and at the end of the project when the project’s major deliverables are ready to be made available to everyone.

The goal is to:

1. Ensure that deliverables are distributed appropriately at different points in your project.
2. Ensure that an incomplete deliverable is not provided ad hoc to customers before its time.
3. Communicate how the new deliverable’s release affects items already in the field or “in the production pipeline” inside the company (see the “DISPENSATION” part of the forms).

Generally, once a deliverable is released, it is kept under more stringent change control. Now that we’ve released an approved version of a deliverable, changes have to be approved officially and any updated versions of the deliverable released in a controlled fashion, as well.

To get set for using the form:

1. **Select deliverable(s):** Decide what deliverable(s) could benefit from being released officially.

2. **Beginning of Release Control:** Decide when, during a project, the item(s) should start the official release process.
3. **Release Process:** Define your release process, including:
 - What release form should be used.
 - What reviews or testing of the deliverable should be done before it can be released.
 - Who should review and sign off on the release form.
 - Where the released version of the deliverable will be stored.
 - How the release form will get distributed inside and outside the company each time.
 - Where official release paperwork will be archived.
4. **Form Tailoring:** Update the fields of the template form, if necessary, to fit your situation.

Description of the form fields:

- **Software Release:** Space for name of who is originating the release and the date.
- **Overall Reason for Release:** Is it to correct problems with a previously released deliverable? To provide enhancements to an existing deliverable? To release a totally new deliverable?
- **Modules Being Released:** List documents, product modules or sub-systems, software components that are being released.
- **Summary of Testing or Reviews Performed:** This field is to ensure that the item has been reviewed and/or tested appropriately before it is provided to a wider audience.
- **Dispensation:** What existing products are affected and where the released item should go.
- This item is intended to make sure the deliverable is distributed appropriately. This includes making sure that the appropriate users (and perhaps just a subset of possible users) receive the new release. If the item is a product in the field or software deployed internally in the company, which customers/users should get it? Is it intended to replace deliverables in the field? If physical hardware or publications are being released, what should happen to any physical materials that are being replaced: should they be scrapped? Returned to the company? Retrofitted or updated?

- This section also includes a place to note what notification is needed. For example, when a product in the field is being affected, does a written bulletin need to go to service personnel in the field? Directly to customers? For new software features being deployed in the company, what notification to users in the form of instructions for installation or use?
- **Special Instructions:** Any other instructions relevant to the release.
- **Signatures:** Signatures from whoever should approve this release.

Administrative Information

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